

SOAR Dialogue Highlights 9/17/19

Attendees: Emily Carmody, Janet Harris, Christina Heggins, Meredith Malpass, Malik Kennedy, Natasha Posey, Alicia Merrill, Regina Hardaway, Connie Ness, Kathryn Coiner-Collier, Stacey Costner

Introductions

- Emily Carmody, NCCEH, Raleigh- SOAR training in Charlotte scheduled for October
- Janet Harris, Monarch, Raleigh- just got new referral, looking to engage
- Christina Heggins, Mecklenburg County, Charlotte- client passed away in March, application for SSI and SSDI approved, \$40,000 for daughter from backpay
- Meredith Malpass, VA Medical Center, Asheville- been a while since focused on SOAR
- Malik Kennedy, DUPD-HAT, Durham- started two cases
- Natasha Posey, Southlight, Raleigh- bi-monthly meetings starting in January
- Alicia Merrill, Pisgah Legal Services, Asheville- had a weird denial letter for SSI
- Regina Hardaway, Triangle Family Services- no updates
- Connie Ness, Southlight, Raleigh- no updates
- Kathryn Coiner-Collier, Atrium Health, Charlotte- working on cases in Union County, sending another employee to the SOAR training
- Stacey Costner, Mental Health Association of Cleveland County- learning a lot while trying to set up expedited hearing, working with key MH providers to improve documentation of functioning

Announcements

- SOAR Training on October 22-23 in Charlotte. Please have those interested in the training visit NCCEH's website to complete an application.
- Congratulations to Danielle Arthur who is the newest person to achieve SOAR Caseworker Certification!
- Annual meeting is coming up in December. We are working on a place to hold the meeting. Will most likely be on December 5th or December 12th.

SOAR and SSA Field Offices

Overview

As a carryover from the August SOAR Dialogue call, DDS staff came back to the SOAR Dialogue call to present information about how to request an Electronic Claim File from the SSA field offices. Once a claim leaves DDS, SOAR caseworkers who want to access the file to see what medical documentation was submitted and to see the how DDS made their decision. DDS staff reviewed the attached document provided to explain how SOAR caseworkers can request an electronic file.

After this presentation, SOAR caseworkers discussed engaging local SSA field offices and any issues they are currently facing with their field offices.

Comments in reviewing the DDS document

- Can use any consent form to request electronic file. The SSA form is the SSA-3288.
- SSA will not disclose the entire record- caseworkers need to be specific about specific documents they want
- Electronic file copy is free with a pending appeal and response time is within 30 days

Engaging SSA Field Offices

How are things going with your SSA Field Office?

- Raleigh- Good working relationship with office. SSA contacts are invited to ongoing SOAR meetings which is a good arena to discuss issues and ask questions. SSA contacts come on a somewhat regular basis.
- Charlotte-No regard for SOAR applicants being vulnerable to expedite claims. Not able to get filed or information. SOAR caseworkers are having a meeting with SSA field office staff with a focus on ironing out the expectations.
- Durham- SOAR caseworkers are very fortunate to have Jennie as the SOAR contact. SOAR caseworkers can drop of materials at window 16 as needed.
- Wilson/Raeford- trouble getting a point of contact at the SSA office. Emily will reach out to Randy to see about getting a contact.
- Asheville- Relationship is great. SOAR contact is very responsive and alternates between two claims reps.
- Shelby- Point of contact changed at field office and that has made a great improvement.

What are some strategies for building partnerships with SSA field offices?

- Invite SSA field office staff to regular SOAR caseworker meetings if your community has them.
 - Great way to answer questions and address issues before they go on for too long
 - Develop relationships with SSA field office staff as people
- When making requests of SSA field office, keep in perspective that SOAR is a small percentage of the field office's work
- When meeting with SSA, provide agenda and/or questions ahead of time so they can have responses in the meeting
- Offer concrete examples of issues from past cases
- Meet as a group of caseworkers with SSA so they can communicate to everyone at one time
- Ask Emily to attend meeting and to see if Randy Howell from SSA can help with the meeting

Next SOAR Dialogue Call will be October 15th at 10 AM: <https://www.ncceh.org/events/1357/>